The Appointment Scheduler

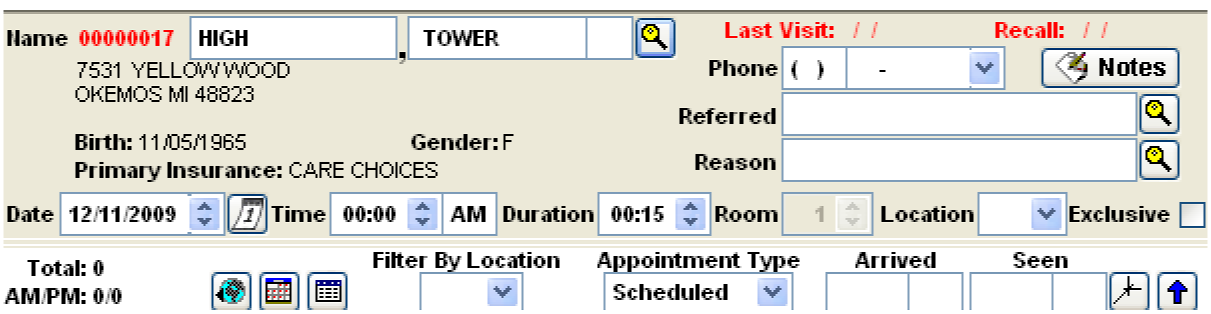
The Appointment Scheduler will display as you have configured it previously. (If you do not see the changes you initiated, please return to **Configuration** and/or **Provider Entry.)**

SCHEDULING A PATIENT

This field is used to schedule your patients. Click on the magnifying glass and your Patient List will pop up.

If you wish to schedule an appointment for a patient that is not already entered in your system, we advise that you create a patient entry (NEW PATIENT) that you use every time this situation arises. ClinicPro will allow you to type in a name that is not in your database, but that entry can never be amended in status.

Once your patient list is open, locate the patient you are trying to schedule for, double-click their name. Their demographic information will fill in to the fields:



Name: This field reflects the selected patient's assigned ClinicPro Patient Number, then Last Name, followed by First Name and Middle Initial if available.

The selected patient's address appears below the Name

Birth: The birth date of the selected patient is reflected here.

Gender: This field will show M if the selected patient is a Male or F if the patient is a female.

Last Visit: This displays the last day an appointment was scheduled for this patient.

Recall: If a date for recalling the patient back into your office has been entered, it will appear here.

Phone: By default, the home phone number is displayed. If a work number or other number is available, it will display in the dropdown list.

Notes: The Notes button allows information about this particular appointment to be filled in for the benefit of the office staff.

Referred: The browse feature accesses the referral doctor database and can link a specific referring doctor to an appointment.

Reason: This browse feature accesses the referral doctor database, and can link a specific referring doctor to an appointment.

The **Date, Time, Duration, Room number,** and **Exclusivity** for this appointment display, if an appointment is selected. Each field, except Room allows those values to be changed before the appointment is saved.

Location: If a multi-location version of ClinicPro was purchased, this allows a patient to be scheduled at a particular location.

Filter- by- Location: This feature allows only the appointments scheduled at a particular location to be viewed if the multi-location version of ClinicPro has been purchased.

Appointment Type: This drop-down menu indicates if the selected appointment is for a regularly **Scheduled** appointment, a **Walk-in** appointment, or was scheduled with **Multiple** appointments at once (as in a Treatment Plan).

The time **Arrived** is automatically set when marking a patient as arrived.

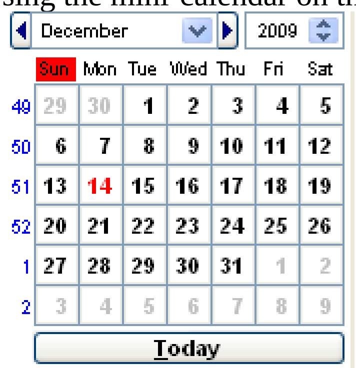
Seen: A time the patient was seen by the provider can be recorded here by clicking the clock icon to the right of this field.

Once you have your patient information pulled into the Appointment Scheduler demographic fields, you can enter them into the Scheduler at the appropriate time and room/column.

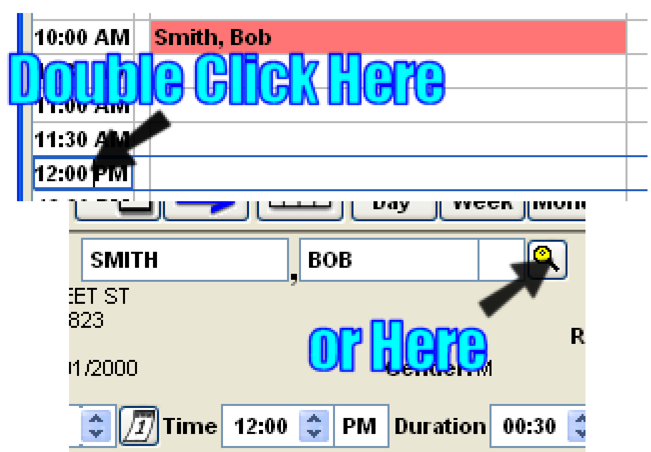
Adding a New Appointment

Before adding a new appointment, make sure Clinic Pro is viewing the correct provider's schedule. The current provider being viewed is displayed at the top of the screen in the header. Click the  button to move to the next provider's schedule. The Provider's name will display in the blue bar of the Scheduler as you see below. You will enable this feature if you have more than one Provider entered on the Provider Entry Form. Their name(s) will display exactly as you have entered them on the Provider Entry Form.

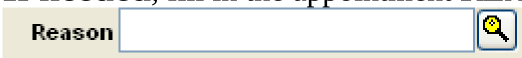
- Using the mini-calendar on the top right, select the date that the appointment will occur on.



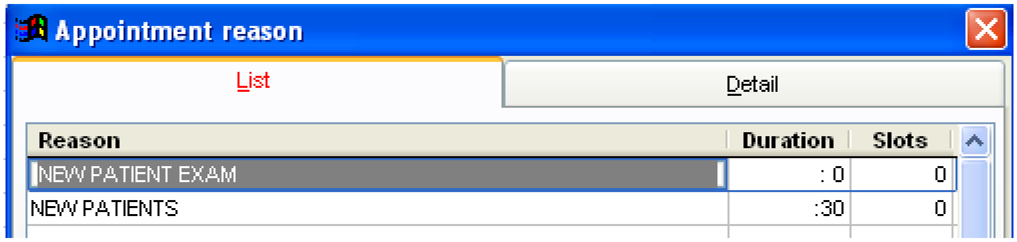
- Double click on the time the patient is to be scheduled. **OR** Click once on the empty timeslot the patient is to be scheduled.



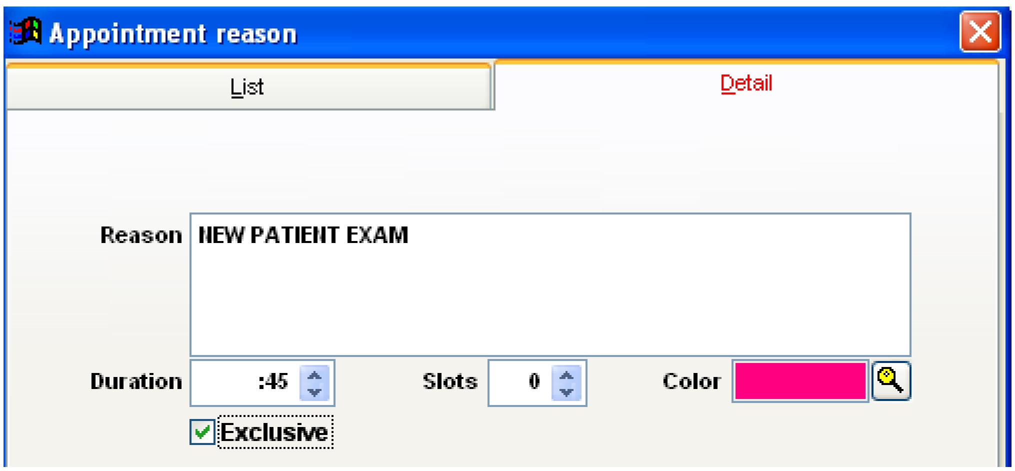
- **If needed**, fill in the appointment **REASON** code.



Click on the Magnifying Glass.



To create a New REASON, click on the New Icon 



You are able to enter the **REASON** for the visit

You are able to enter the **DURATION** for the visit. Some of your appointments may require longer time slots. Here you can determine how long that visit may take.

SLOTS, please leave set to 0 unless you have chosen to have your Appointment Calendar display by Slots Per Time.

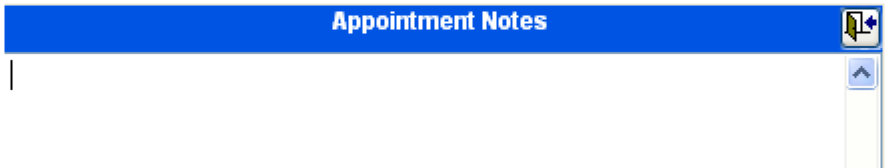
You are able to assign different **COLORS** to appointments so that your Scheduler will be easier to read visually.

The **EXCLUSIVE** box, if checked, will display the appointments as using up the appropriate amount of time on the Scheduler. If you do not check this box, your appointments will only use one time slot.

Save this added info, and repeat the steps to create as many REASONS for appointments as necessary for your office.

- **If needed**, fill in the **NOTES** section: 

The use of the Notes box is optional - Clinic Pro users may decide whether or not to use it. When you print an appointment report, you have the option of printing the notes that are specific to each patient. To associate a Note with a particular appointment, click the Notes button before saving the appointment. The notes screen will open up right underneath the icons.



Type in the appropriate note and hit TAB when finished. When that appointment is highlighted, the Notes button will be red, and on the regular daily view of the scheduler, there will be a red **!** next to the patient's name. These are the alerts that a note exists for this appointment.

- To add the patient’s appointment, just click in the appropriate time slot and room / column.
- Click Save 

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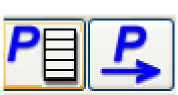
There are quite a few features built in to the Appointment Scheduler to assist your office in practice management. The remainder of this training document provides information on these features.

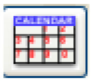
Starting from the top left of your Scheduler:

The Icons displayed at the top of the Appointment Calendar allow you to edit or navigate to various places in Clinic Pro. The following is the legend:

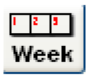
Clear - This icon clears the active patient from the screen.

This feature will allow you to edit the appointment information. It is also accessed by “right-clicking” on the patient name from the scheduler and choosing “Edit.” You can edit the appointment reason, the provider, etc. One of the options for editing is the patient’s appointment date and time. We advise that you do this from the “Reschedule” option as it will be quicker.


As explained earlier, you can scroll through your Provider’s schedulers.

 This is the calendar view icon. Input notes that are specific to a particular day. The days that you do choose to add notes to can, display on the calendar icon as a different color so you know you have a note there. Right click on the day before you enter the note to choose the color.

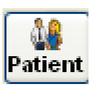
The Day icon displays a daily view of appointments



The Week icon moves to a week-at-a-glance view. Double click on an available time and immediately be placed on that day's schedule.

The Month icon moves to a month-at-a-glance view. Double click on an available time and immediately be placed on that day's schedule.

This icon means walk-in, a patient without a scheduled appointment. To schedule a walk-in patient, they must first be in the current patient list.



This icon navigates to the patient screen of the active patient.

 This icon navigates the user to the transaction screen of the active patient.

 If the user wants to know the patient balance of the active patient without going to the transaction screen, click this icon.

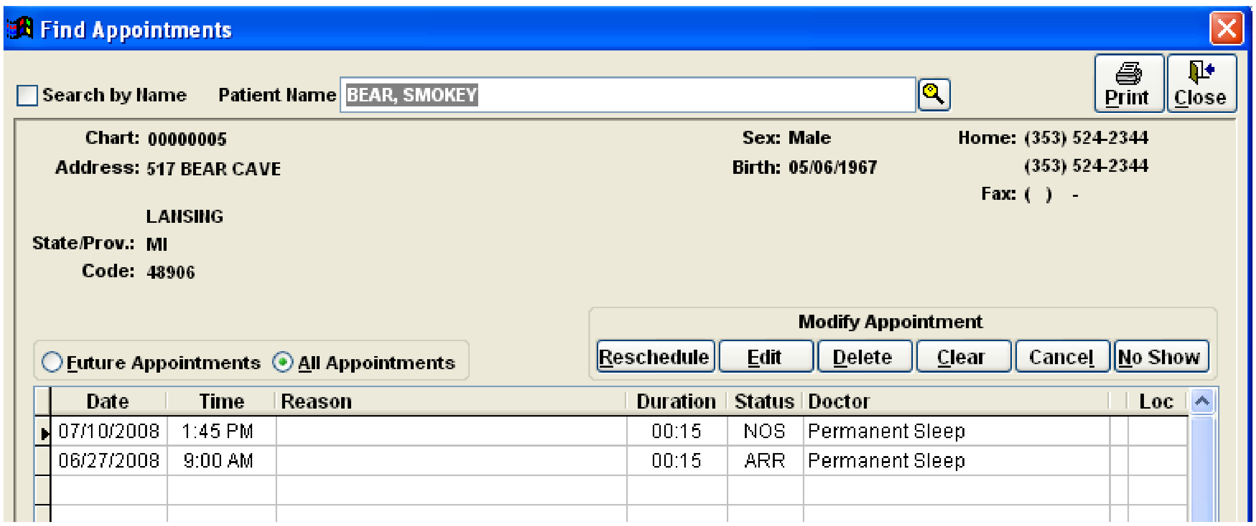
The label icon moves the user to an opportunity to print labels or super bills. (See **Superbill** for more explanation)

The print icon takes the user to the appointment book print screen. There are many options for the type of printout selected. (See **REPORTS** – Appointments for more info).

There are more features on the right hand side of the Scheduler:

Clinic Pro provides an easy way to locate the next appointment by clicking on the Find Appointment button.

Then, select the patient from the browse list by double-clicking on the patient's name. If there is a patient previously selected on the Appointment Calendar screen, this will auto fill. Clinic Pro will list all of the patient's appointments.



Sort the list by **all appointments**, or only **future appointments,** and **Print** the list for an easy reminder of appointment dates & times, to give to the patient.

From this screen, select any appointment shown and Delete, Edit, Reschedule, or assign it an arrival status. Simply use the button for the action desired while an appointment is selected.

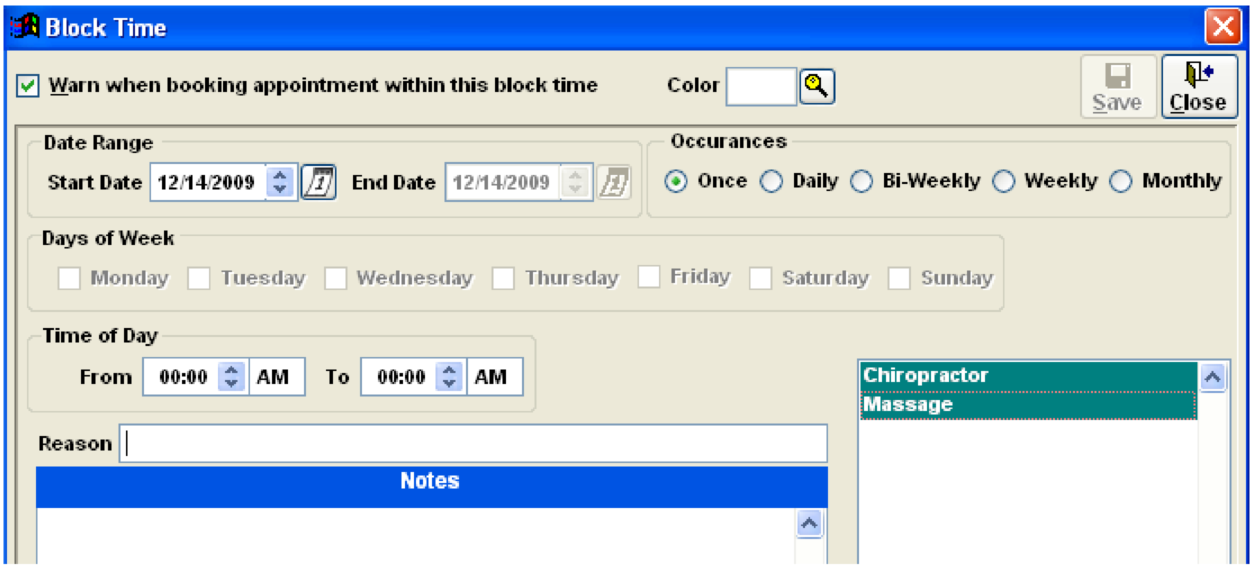
You can find an available time for an appointment with this feature.

If the doctor needs to take time off during a regularly scheduled work day (normal hours), and it is not for a patient appointment, you can use this feature. There may also be many more reasons why your office would choose to block time off on the Scheduler.

Click the Block Time button:

A list of existing blocked times will appear. The user can edit or delete any existing blocked time by selecting it and pressing edit or delete.

To create a new blocked time, press the New button, and fill in the criteria for how this time will be blocked off.



Warn when booking appointment within this block time: This will flag a warning when attempting to save a new appointment in this specified time. You would commonly leave this checked. Then, you can uncheck this when simply coloring a block of the schedule for a visual aid in "zoning" a time for a specific purpose, like a "New Patient Time".

Color: Specify the color of this blocked time, generally darker shades are better used for blocked times.

Occurrences: How often this blocked time will occur. If the office is just going to be closed for one day, or a portion of a day for a holiday, simply choose once.

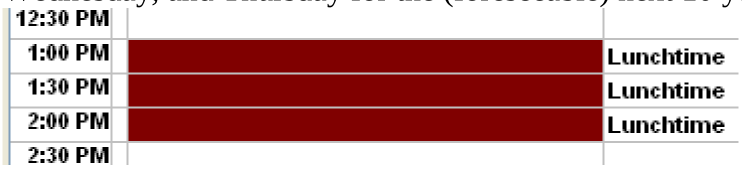
Date Range: Specify the range of dates in which this time will be blocked off based on what was entered in Occurrences.

Days of Week: For weekly / bi-weekly, and Monthly, specify which days of the week this occurs on.

Reason: Input a name for this blocked time. This will be listed on the appointment calendar as well as on the list of blocked time.

Providers Schedules: Blocked times will default to all the provider's schedules. To specify blocked time for only one provider, click their name.

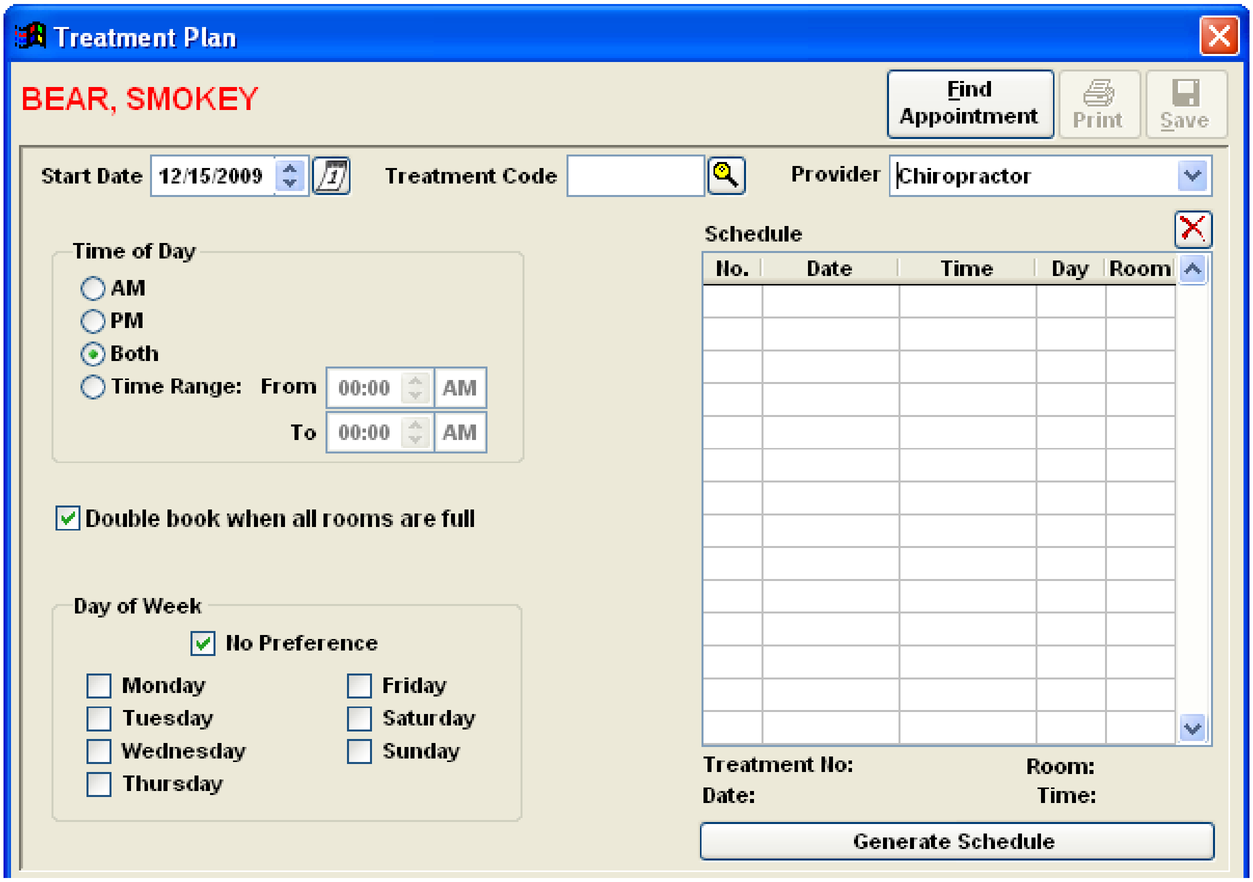
The above example is illustrating a Lunch break between 1-2:30 every Monday, Tuesday, Wednesday, and Thursday for the (foreseeable) next 10 years, on Doctor Billing's schedule.



This feature will help you reschedule your patient's appointment, yet using the right-click feature on your mouse is quicker and more efficient.

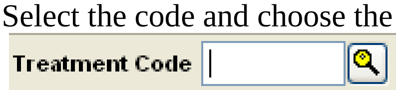
Add a batch of appointments for a single patient in one action using the Treatment plan option.

To start adding a treatment plan, select the patient desired to add appointments for. (Using the find  at the top of the screen, or selecting an appointment on the list).



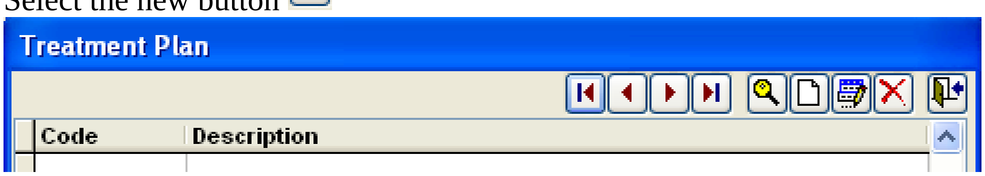
Select a Treatment code  . The Treatment Code must have already been created

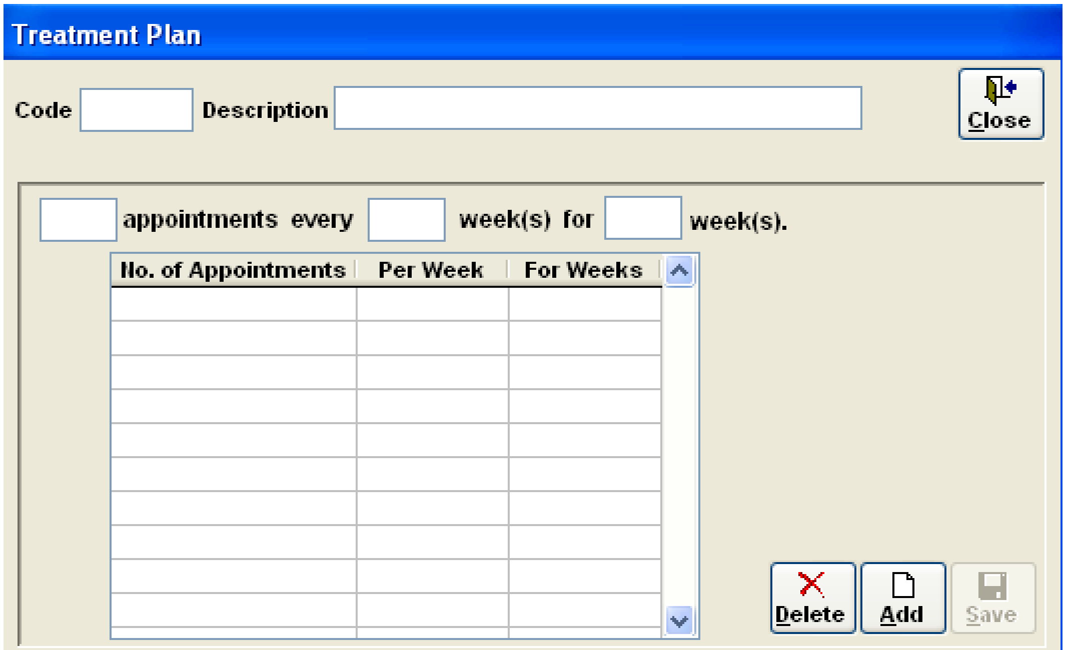
To Edit an Existing Code: Select the code and choose the Edit button 

To Create a New Code: 

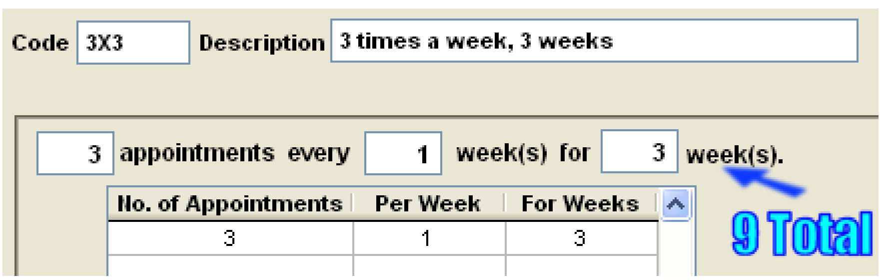
Click on the magnifying glass.

Select the new button 





Create a shorthand code, and a description of the plan. Then input how many appointments will be entered. This is read like a sentence "X appointments, every X weeks, for X weeks."
Example:



Click Save 

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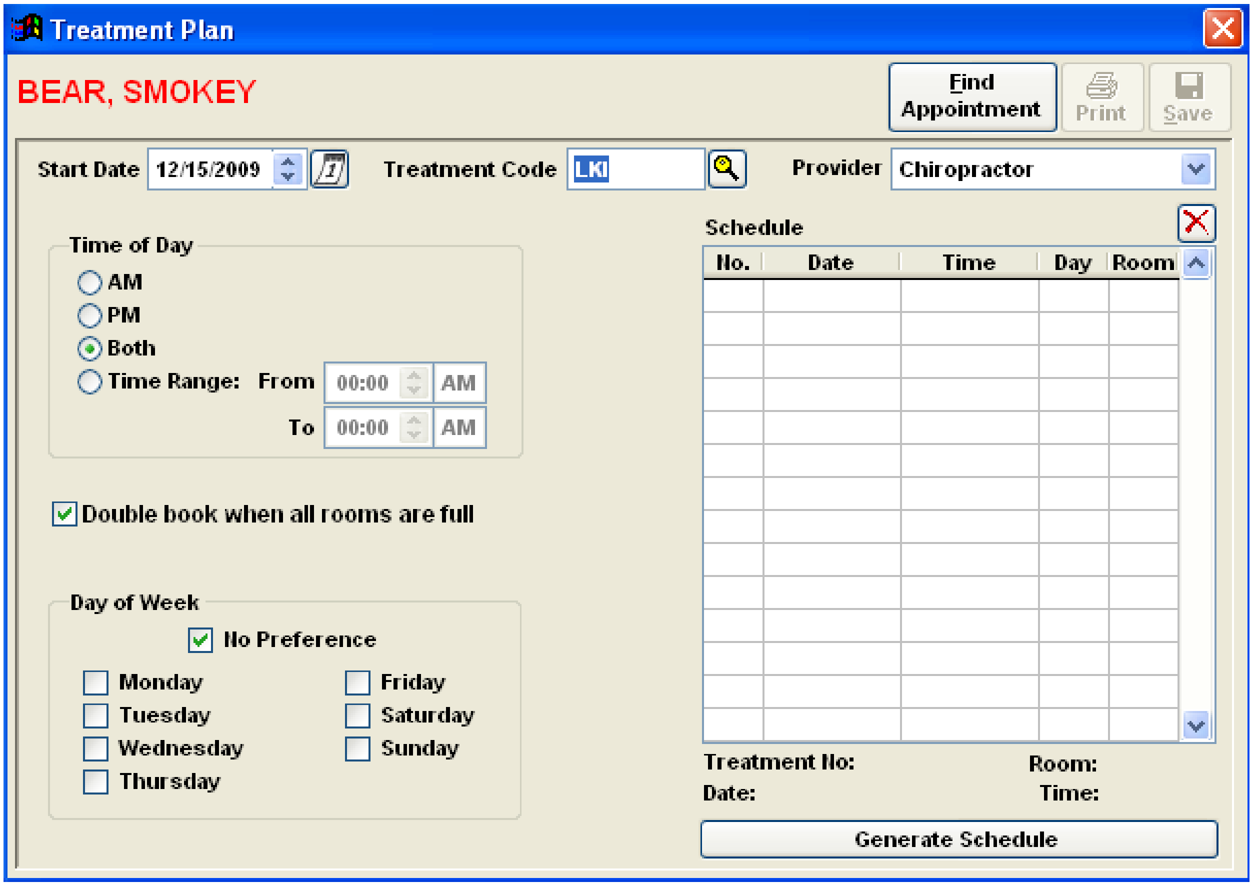
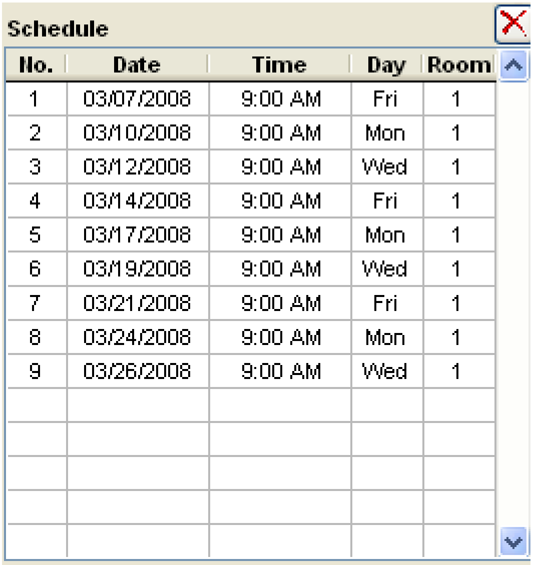
Now that you have created the Treatment Code(s):



Select the doctor whom the patient will be seeing (this will default as the current doctor being viewed).

Select the Start Date in which the appointments will start at, and the patient's availability. In the above example, the patient has no time of day, and no day of week preference, so when generating the schedule it will simply find the first available days and times. If the patient is on a 3x a week plan, and can only make it in mornings on Monday / Wednesday / Friday, you would fill in **AM** (or the time range), and check Monday Wednesday Friday, and only those appointments that match the criteria will be generated.

Once satisfied with the appointment search criteria, select Generate Schedule on the bottom to create a list of the appointments. The following is an example of the above search criteria, with a 3 times a week, for 3 weeks plan.



Schedule

No.	Date	Time	Day	Room
1	03/07/2008	9:00 AM	Fri	1
2	03/10/2008	9:00 AM	Mon	1
3	03/12/2008	9:00 AM	Wed	1
4	03/14/2008	9:00 AM	Fri	1
5	03/17/2008	9:00 AM	Mon	1
6	03/19/2008	9:00 AM	Wed	1
7	03/21/2008	9:00 AM	Fri	1
8	03/24/2008	9:00 AM	Mon	1
9	03/26/2008	9:00 AM	Wed	1

Clinic Pro will generate a list of all the possible appointments it can give. Select Print to print a list of these appointments to give to the patient, as a reminder of all their future appointments. When done, click the Save field and all the appointments will be saved in the calendar.

If a single appointment or two do not work for the patient, simply select it in the list and hit the delete icon, they will be removed. If unsatisfied with the results change the criteria and generate the schedule again.

It is inevitable that some patients will forget their appointments. You can use the recall list as a tool for ensuring that future appointments are scheduled.

If the doctor wants to re-exam the patient in six months, the patient may not want to book six months in advance. For those circumstances, click the Recall List button.

Click New.

Pick a date six months from now and put in the patient's name. If a reason or notes are appropriate, input them and click the Save icon.

To print a list of people who are on the recall list, click the Print icon on the navigation bar, and select Recall List. This will print a list of those people needing reminder calls.

The purpose of the wait list is to move patients who want an immediate appointment into an opening when someone cancels. Clinic Pro provides a "wait list" for those patients who are waiting for an appointment opening.

To add a patient to the wait list the user may convert an existing appointment to the wait list or create a new entry straight on the wait list.

To Convert an Existing Appointment: Select the appointment desired on the wait list, and click the Wait List button. Enter any extra information such as notes, and save.

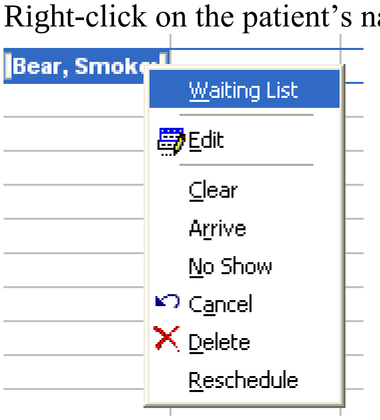
To Create a New Entry: Without any appointments selected, click on the Wait List button. Click New  and add the patient. Enter any extra information to include in this entry, such as notes, and click Save when finished.

Print out a copy of the Wait List from the Print button, and Wait List.

The "Right-Click" Feature using your Mouse

Once a patient's appointment is made on your Scheduler, you can change the status, or amend the appointment, using your mouse. Using this feature is the quickest way to enable any of the features:

Right-click on the patient's name, the list of options will display:



Waiting List- this is the same feature as previously explained. The purpose of the wait list is to move patients who want an immediate appointment into an opening when someone cancels. Clinic Pro provides a "wait list" for those patients who are waiting for an appointment opening.

Edit- This feature will allow you to edit the appointment information. You can edit the appointment reason, the provider, etc. One of the options for editing is the patient's appointment date and time. We advise that you do this from the "Reschedule" option as it will be quicker

Clear- You can remove the patient's status, like "Arrived," "Late," from their appointment.

Arrive- When your patient arrives for their visit, click this option and the appointment will display the color that you have chosen for "Arrived" in the Configuration. This will also count in status on the Appointment Book reports that you wish to run.

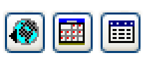
No Show- Using this option will display your patient's appointment as the color you have chosen in Configuration. This will also count in status on the Appointment Book reports that you wish to run.

Cancel – Using this option will pop up a box where you can add notes for your cancelled appointments. If you have patients on your Waiting List, ClinicPro will pop up a message asking if you wish to add any of these patients on the Scheduler. This will also count in status on the Appointment Book reports that you wish to run.

Delete – Easily delete an appointment from this option.

Reschedule – This feature is the best option for rescheduling for your patient. Simply click Reschedule, advance to the new appointment time and click in that slot. Click "Save."

Other Features of the Appointment Scheduler:

 The first icon **refreshes** your Appointment Scheduler. This is helpful if the office books for multiple locations, or multiple providers.

The next icon **changes views**. If you have more than one provider that you will book appointments for you can use the **Multi-Provider** view. This will display the different provider's appointment through one calendar view. The change view icon brings your Scheduler back to Single Provider View and back to Multi-Provider View.

The last icon is the Multi-Provider View.